

## Practice Lab

### Frequently Asked Questions

- 1) Tax exempt interest is not handled correctly on Line 8a; it is added to the taxable interest.

**Response:** You have to load the Interest Statement and mark the interest as Tax Exempt with the appropriate code. Linking to and using the Interest Statement instructions are in the Linking Document on the Help Center.

- 2) Form 8880, cannot get the red out of line 4; F3 brings up the Find window, and you cannot overtype it.

**Response:** TaxWise Online and TaxWise Desktop share the same form engine and calculation files. Since the majority of our users are still using the desktop application, the form backgrounds contain references to the desktop function keys. You must press Ctrl+Spacebar to either mark a field as required (red) or to remove the red.

- 3) Main Info, Special Processing drop down list still contains ESP option

**Response:** The Rebate Recovery Credit for taxpayers with no filing requirement requires the return to be flagged as "ESP" for processing \$0 AGI returns.

- 4) Tree – Being in one form and then selecting another, highlights both of them. Confusing. But only the last one you select is actually displayed, which is good.

**Response:** This is because the form is refreshing when you select the other form. Since we are using the Classic mode, it has to send the entire page back to the server, which means the highlight cannot be turned off the originally highlighted form until it receives a response and saves the return.

- 5) Tree shows Capital Gains Worksheet under Main Info, rather than Schedule D, even though schedule was added to the tree.

**Response:** This is a display issue and has no negative affect on the return calculations.

- 6) Schedule A, line 21 forces you to use the Business Expense worksheet, but only enters the first line of this scratch pad in the Type and Amount, but does total it in the complete line 21.

**Response:** The software correctly lists the first expense and amount on Schedule A line 21 Type and Amount. It also places the total amount from the scratchpad on the correct total amount line on Schedule A line 21. (Note: Desktop works the same way)

- 7) Form 1040 line 73, cannot get the red out when the form 8888 is used. F3 brings up Find dialog.

**Response:** TaxWise Online and TaxWise Desktop share the same form engine and calculation files. Since the majority of our users are still using the desktop application,

1/2/09

the form backgrounds contain references to the desktop function keys. You must press Ctrl+Spacebar to either mark a field as required (red) or to remove the red.

- 8) The only time a form appears to update automatically is when you enter the zip code and tab out.

**Response:** To calculate and save you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is utilizing the application mode that does not auto-refresh.

- 9) Main Info, Often you cannot complete a field until you have done a Save Return. Ex: deceased date, cannot check the spouse box until after you do a Save Return.

**Response:** To calculate and save, you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is using the application mode that does not auto-refresh.

- 10) Main Info, On the Dependent List, Child Tax Credit does not get checked until after you do a Save Return.

**Response:** To calculate and save you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is using the application mode that does not auto-refresh.

- 11) W2 – You cannot enter a different SS & Medicare amount, until you have checked the *Take Calculation Off* of 3 & 5 and done a Save Return.

**Response:** To calculate and save you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is using the application mode that does not auto-refresh.

- 12) I do not see a print form button – is that not on TWO?

**Response:** We have disabled printing.

- 13) Capital Gains Worksheet – Does not auto-complete IN/HE/RIT

**Response:** To calculate and save you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is using the application mode that does not auto-refresh.

- 14) Capital Gains Worksheet – Again the common complaint that it does not compute the gain or loss or the L or S until after you have pressed Save Return

**Response:** To calculate and save you **must** select the **SAVE button** on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is using the application mode that does not auto-refresh.

1/2/09

- 15) Form 1040 Page 2 Line 39c check box is grayed out, but then on line 40 it asks for the amount of real estate tax and requires you to enter on Sch A and then carries it forward to line 40 and checks the box on line 39c.

**Response:** The form is calculating correctly. We are calculating this from the Schedule A, since that is where the Real Estate tax is entered. The program will only utilize the real estate portion of the Schedule A if the Schedule A deduction is lower than the standard deduction

- 16) Form CEZ – line 5a business miles are all automatically put on the 50.5 line, and you cannot correct it. Then you have to enter the correct number of miles on the 58.5 line and then the 50.5 line is corrected.

**Response:** The form is calculating correctly. Enter the total amount in a, b, or c. For example: Enter 10,000 miles on 5a and it automatically populates the 10,000 miles in 50.5 line (which is calculated). Direct enter the amount of miles that were used from 7/31/2008 through 12/31/2008 on the 58.5 line and the amount is automatically deducted from the 50.5 line.

- 17) No obvious “What If”

**Response:** The Practice Lab does not have a “What if” feature.

- 18) The capital gain detail sheet will not take the word, inherit. How do I handle this?

**Response:** On the long term capital gain detail sheet, you enter the letters in/he/rit in the date acquired field. After the other entries, hit the SAVE button and it will calculate. It will carry over the information to the Schedule D.

- 32) The mileage date on Sch C-EZ is listed as **7/31/08** - 12/31/08. The correct date should be **7/1/08**.

**Response:** It is a display issue. The computation is correct.